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Foreign Crops and MARKETS

VOLUME 58

NUMBER 8

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MAR 23 1949
U.S. DEPARTMENT OF AGRICULTURE

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RELEASE

MONDAY

FEBRUARY 21, 1949

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Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

Cuban supplies of lard and edible oils were larger in late January than at any time in 1948 according to the American Embassy, Havana. This was a result of increased import quotas for the first quarter, but there still remains a large deficiency to be met before all reasonable demand is met and prices become normal.

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Egypt's 1948 rice crop is placed at a record of 64,074,000 bushels compared with 62,533,000 bushels in the preceding year and with the prewar (1935-39) average of 33,155,000 bushels, according to the final estimates of the Ministry of Agriculture. The largest acreage yet harvested amounted to 816,000 acres against 805,000 in the year before. Exportable supplies are now unofficially estimated at 880 million pounds, or around 100 million more than last year's record exports.

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The 1948-49 cotton crop in El Salvador is revised slightly downward to 21,000 bales (of 500 pounds) compared with recent estimates of 23,000 to 25,000 bales. This is about equal to the record production level of the previous 2 years and about 8,000 bales above the annual requirements of the domestic industry. Most of the surplus in recent years has been exported to Guatemala, Venezuela, Costa Rica and Honduras.

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WORLD CITRUS PRODUCTION FOR 1948 8 PERCENT BELOW 1947

World production of citrus from the bloom of 1948 is now indicated to be 348 million boxes, 8 percent below the 1947 production of 377 million and 27 percent above the 5-year (1935-39) average of 273 million. Oranges account for 78 percent of the estimated world production, grapefruit 15 percent, lemons 6 percent, and limes 1 percent.

Orange (including tangerine) production in 1948-49 estimated at 270 million boxes is 4 percent below the 280 million boxes produced the previous season but 27 percent above the 5-year average of 213 million. Grapefruit production, indicated to be 52 million boxes, is 20 percent below the 1947 crop of 66 million but 49 percent above the 1935-39 average of 35 million. Lemon production, estimated at 22 million boxes, is 19 percent below the previous year's production of 28 million boxes and 3 percent below the 5-year average of 23 million. Lime production is indicated to be 3.2 million boxes, as compared with 3.4 million in 1947 and 2.3 million for the prewar average.

Oranges and Tangerines.- Production of oranges in North America is indicated to be 120 million boxes or 7 percent below the 1947 crop of 129 million boxes but 60 percent above the prewar average of 75 million. The United States production, estimated at 104 million boxes, is 9 percent below the 1947 crop of 114 million but 56 percent above the 1935-39 average of 67 million. In California January weather was marked in all important producing areas by freezing temperatures, snow, ice and wind storms. Navels and miscellaneous oranges are now estimated at 11.4 million boxes, 40 percent below last year's crop. Valencias estimated at 22.5 million boxes are 16 percent below last year's crop of 26.8 million. Texas citrus suffered from freeze damage on January 30 and 31. Fruit losses are estimated to be serious. Orange production is now indicated to be 4 million boxes, 23 percent below last year's crop of 5.2 million. The orange crop in Arizona estimated at 760,000 boxes was reduced about one-third because of the January freeze. Florida production estimated at 61 million boxes is 4 percent above the 58.4 million produced during 1947. Production in Mexico, estimated at 11,653,000 boxes, compared with 10,866,000 boxes for the previous year and 4,761,000 for the prewar average.

The European total of 44.1 million boxes is 7 percent larger than the 1947 crop of 41.3 million and 19 percent larger than the prewar average of 37.2 million. The increase occurred chiefly in Spain where the 1948 crop is estimated at 29.3 million boxes, compared with 27.6 million for 1947 and 24.2 million for 1935-39. The greatest increase occurred in the province of Castellon where many trees damaged by the freeze in 1946 are now bearing fruit. The Italian crop of 12.8 million boxes is 5 percent above the previous year's crop of 12.1 million and 9 percent more than the prewar average of 11.7 million. Production in Greece of 2,041,000 boxes is an increase of 35 percent over the 1947 crop of 1,509,000 and 62 percent above the prewar average of 1,257,000. Growing conditions were good in 1948, and this fact, with an increase in the number of bearing trees, accounts for the larger production.

Production in Asia, estimated at 23.9 million boxes, is a decrease of 24 percent from the previous year's crop of 31.5 million and 14 percent below the prewar average of 27.8 million. Most of the decline in this area results from a smaller output in Palestine, where the current production is now indicated to be 5,750,000 boxes, as compared with 13,000,000 for the previous crop. In 1948 production in Israel represents 90 percent of the total orange acreage of Palestine. Because of hostilities, it was impossible to irrigate the citrus groves as much as usual and the crop is small. Production in Lebanon estimated at 1,020,000 boxes, compared with 1,650,000 for 1947, is attributed to late frosts in the spring, the severity of hot winds in the summer and to the fact that 1948 was an "off year" for citrus production.

The orange and tangerine crop in South America is indicated to be 57.4 million boxes, 2 percent above the 1947 crop of 56.2 million and 5 percent higher than the prewar average of 54.8 million. Production in Brazil continues to increase with the 1948 crop indicated at 33 million boxes. In Bolivia production of around 3 million boxes annually is practically all consumed within the country. Plantings of orange trees in Chile in recent years have been relatively large and as a result a sharp increase in production is expected in the future.

Production in Africa for 1948 is indicated to be 21.3 million boxes, 8 percent higher than the 1947 crop of 19.8 million and 39 percent higher than the prewar average of 15.4 million. Algeria estimated at 5.4 million boxes, French Morocco at 2.8 million and South Africa at 6 million compares with 3.7 million, 2.4 million and 5.5 million respectively and account for most of the increase. The increase in production in Algeria is due to the well distributed rainfall in the spring and early summer, adequate use of nitrogenous fertilizers, increased use of mechanical equipment and to cool fall days which reduced the ravages of the fruit fly.

The 1948 crop in Australia and New Zealand is indicated to be 3.3 million boxes as compared with 2.8 million in 1947 and 2.7 million prewar.

Grapefruit.- The United States, by far the world's largest producer of grapefruit, has an indicated crop of 48.4 million boxes in 1948, 21 percent below the 1947 crop of 61.6 million (of which over 10 percent was abandoned) and 52 percent above the prewar average of 31.8 million. Florida grapefruit, estimated at 30 million boxes, is 9 percent below the crop in 1947. Utilization in Florida this crop season to date amounted to 14.6 million boxes, compared with 11.1 million

CITRUS FRUIT: Production in specified countries, average 1935-39, annual 1944-48

ORANGES, including tangerines

Continent and country	Average 1935-39	1944	1945	1946	1947	1948 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
NORTH AMERICA:						
Costa Rica	6	30	30	30	30	30
Mexico	4,761	8,943	9,280	10,778	10,866	11,653
United States	67,034	113,210	104,350	118,540	114,380	104,380
Cuba	1,050	1,150	1,125	1,175	1,200	1,500
Dominican Republic	500	321	485	428	409	425
Jamaica	595	525	650	565	760	750
Puerto Rico	800	1,035	742	800	900	1,000
Trinidad and Tobago	55	75	75	77	80	80
Total	74,801	125,289	116,737	132,393	128,625	119,818
EUROPE:						
Aegean Islands	43	40	40	40	40	40
France	37	20	21	34	30	30
Greece	1,257	1,000	1,216	1,106	1,509	2,041
Italy	11,701	8,489	9,715	11,640	12,123	12,761
Spain	24,167	30,576	26,603	17,772	27,589	29,258
Total	37,205	40,125	37,595	30,592	41,291	44,130
ASIA:						
Cyprus	441	369	317	600	600	600
Iran	483	1,300	1,500	1,575	1,827	1,921
Lebanon	b/ 1,093	827	1,553	1,211	1,650	1,020
Palestine	8,652	6,000	8,000	9,199	13,000	c/ 5,750
Syria	d/	70	70	73	81	80
Turkey	1,011	965	812	1,054	938	1,009
Japan	15,895	15,669	11,912	12,000	13,000	13,000
Philippine Islands	189	300	315	426	450	500
Total	27,764	25,500	24,479	26,138	31,546	23,880
SOUTH AMERICA:						
Argentina	9,212	11,136	9,092	10,689	12,009	12,000
Bolivia	3,000	3,500	3,200	3,000	3,100	3,300
Brazil	34,466	28,621	29,967	30,084	31,600	33,000
Chile	250	440	500	500	800	900
Ecuador	580	475	568	325	227	400
Paraguay	5,000	6,700	6,450	6,500	6,500	5,500
Peru	1,000	900	900	842	1,154	1,250
Surinam	20	36	43	86	55	100
Uruguay	1,300	794	782	1,196	716	1,000
Total	54,828	52,602	51,502	53,222	56,161	57,450

Continued--

CITRUS FRUIT: Production in specified countries, average 1935-39, annual 1944-48

ORANGES, including tangerines

Continent and country	Average 1935-39	1944	1945	1946	1947	1948 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
AFRICA:						
Algeria	3,168	3,221	3,629	3,055	3,736	5,433
British East Africa	100	150	144	150	150	150
Egypt	6,455	6,915	6,742	7,000	7,427	6,370
French Morocco	1,203	1,766	2,149	1,858	2,377	2,753
Northern Rhodesia	11	13	13	13	13	13
Southern Rhodesia	193	226	259	215	225	225
Tunisia	245	362	425	614	400	400
Union of South Africa	4,000	4,827	4,505	5,326	5,464	6,000
Total	15,375	17,480	17,866	18,231	19,792	21,344
OCEANIA:						
Australia	2,683	2,875	2,606	2,745	2,820	3,240
New Zealand	23	14	5	10	11	15
Total	2,706	2,889	2,611	2,755	2,831	3,255
World total	212,679	263,885	250,790	263,331	280,246	269,877

GRAPEFRUIT

NORTH AMERICA:						
United States	31,787	52,180	63,450	59,520	61,630	48,390
Cuba	375	210	90	150	130	185
Jamaica	213	275	316	300	290	350
Puerto Rico	448	500	500	500	525	525
Trinidad and Tobago	174	190	231	291	300	300
Total	32,997	53,355	64,587	60,761	62,875	49,750
ASIA:						
Cyprus	44	67	60	68	159	200
Palestine	1,445	692	800	1,238	1,500	1,000
Philippine Islands	170	275	300	316	345	350
Total	1,659	1,034	1,160	1,622	2,004	1,550
SOUTH AMERICA:						
Argentina	49	112	93	100	129	140
Surinam	10	20	23	44	16	20
Total	59	132	116	144	145	160
AFRICA:						
Algeria	-	15	15	6	15	19
French Morocco	25	37	42	70	31	85
Union of South Africa	431	681	636	752	771	849
Total	456	733	693	828	817	953
World total	35,171	55,254	66,556	63,355	65,841	52,413

CITRUS FRUIT: Production in specified countries, average 1935-39, annual 1944-48

LEMONS

Continent and country	Average 1935-39	1944	1945	1946	1947	1948 a/
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
NORTH AMERICA:						
United States	9,552	12,550	14,450	13,800	12,870	8,900
EUROPE:						
Aegean Islands	9	10	10	10	10	10
Greece	422	375	328	477	635	769
Italy	9,637	6,784	6,373	7,136	8,137	7,005
Spain	1,444	1,431	812	1,474	1,566	1,218
Total	11,512	8,600	7,523	9,097	10,348	9,002
ASIA:						
Cyprus	53	43	89	83	85	100
Lebanon b/	464	336	725	435	580	348
Palestine	88	312	350	353	500	250
Syria	d/	8	9	9	10	10
Turkey	74	105	153	316	317	242
Total	679	804	1,326	1,196	1,492	950
SOUTH AMERICA:						
Argentina	371	998	1,021	1,134	1,343	1,500
Chile	250	290	350	450	625	850
Surinam	2	5	6	12	15	15
Total	623	1,293	1,377	1,596	1,983	2,365
AFRICA:						
Algeria	102	82	112	102	92	125
Egypt	83	140	150	150	150	150
French Morocco	10	6	14	24	9	19
Tunisia	45	174	174	174	175	175
Union of South Africa	142	170	159	138	193	212
Total	382	572	609	638	619	681
OCEANIA:						
Australia	308	335	356	407	348	398
New Zealand	65	62	54	59	59	60
Total	373	397	410	466	407	458
World total	23,121	24,216	25,695	26,793	27,719	22,356

LIMES

NORTH AMERICA:						
Mexico	652	1,207	1,502	1,681	1,684	1,653
United States	63	250	200	170	170	200
Dominica	87	262	168	202	210	210
Grenada	5	34	20	25	20	20
Jamaica	17	90	60	50	60	60
Montserrat	19	17	17	17	17	17
St. Lucia	62	25	24	25	25	25
St. Vincent	3	3	3	3	3	3
Trinidad and Tobago	24	150	160	130	120	110
Total	932	2,038	2,154	2,303	2,309	2,298
SOUTH AMERICA:						
British Guiana	16	23	52	55	55	55
AFRICA:						
Egypt	1,194	1,247	829	870	910	775
Gold Coast	126	56	134	125	92	100
Total	1,320	1,303	963	995	1,002	875
World total	2,268	3,364	3,169	3,353	3,366	3,228

a/ Preliminary. b/ Includes Syria. c/ Orange production in Israel only; representing 90 percent of total Palestine acreage. d/ Included in Lebanon.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research and other information. Production estimates relate to the crop from bloom of year shown. Harvesting in Northern Hemisphere countries begins about November and in Southern Hemisphere about February of the following year. Production in foreign countries converted to boxes of the following weights. Oranges, 70 pounds; grapefruit and limes 80 pounds; lemons 76 pounds.

CITRUS FRUIT: International trade, average 1934-38, annual 1940-47

Country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
			Oranges, including tangerines						
Exporting Countries:									
United States 1/	4,676	3,998	4,268	4,613	5,373	6,178	6,143	7,694	8,231
United States 2/	183	306	348	321	228	237	283	265	0
British Honduras	2	2	2	1	3	4	4	6	4
Costa Rica	6	4	7	6	34	33	22	7	3
Honduras	16	7	4	10	0	3/	3/	-	-
Dominican Republic	4/ 20	40	54	27	20	31	51	46	46
Dominica	10	9	13	7	9	10	9	10	10
Haiti	5	3	2	4	4	2	4	4	4
Jamaica	227	269	85	10	3/	11	22	83	101
Trinidad and Tobago	19	8	24	7	2	1	23	21	25
Italy	3,591	4,842	6,082	2,691	5/ 158	5/ 215	5/ 143	1,265	3,470
Greece	233	-	-	-	-	-	-	-	-
Spain	19,614	10,226	9,844	7,269	6,390	7,856	8,279	6,347	5,468
France	32	51	84	1	0	0	0	0	3/
Brazil	3,809	2,863	1,950	1,281	1,342	1,271	1,400	2,768	1,702
Ecuador	137	156	72	86	39	91	94	144	160
Paraguay	232	71	12	35	14	15	37	50	50
Surinam	3	1	2	0	2	2	3	25	77
Uruguay	10	6	2	6	1	-	-	-	-
Palestine	7,754	5,631	157	522	1,094	2,815	2,508	5,572	6,800
China	596	125	70	7	24	21	6/	46	45
Cyprus	213	43	6	4	3/	87	112	197	200
Siam	23	12	10	1	0	1	0	-	-
Turkey 1/	51	41	8	3/	1	0	3/	0	-
Japan	1,082	-	-	-	-	-	-	-	-
Japan 7/	889	1,356	1,035	950	729	-	-	-	-
Korea	297	683	334	462	-	-	-	-	-
Formosa	225	458	365	188	-	-	-	-	-
Formosa 8/	66	38	22	57	-	-	-	-	-
Syria and Lebanon	284	297	1	11	0	0	0	36	45
Union of South Africa	2,724	3,593	2,049	2,302	1,247	988	2,492	2,081	2,965
Algeria	1/ 1,370	1/ 2,655	1/ 2,094	1/ 1,459	31	119	128	9/ 772	9/ 1,967
Eygpt	10/ 212	1	3/	3/	0	10	19	25	13
French Morocco	172	501	549	244	38	83	11/ 233	11/ 595	11/ 1,052
Tunisia	104	152	187	112	-	-	-	31	35
Spanish Morocco	11	4	4	1	0	1	6	-	-
Southern Rhodesia	156	191	76	64	31	4	6	-	-
Mozambique	98	6	8	7	11	15	11	-	-
Australia 12/	354	324	269	157	149	146	95	229	13/ 319
Cook Islands 14/	63	131	121	51	44	43	0	-	-
Total	49,569	39,104	30,220	22,974	17,018	20,290	22,127	28,319	32,792

Continued--

CITRUS FRUIT: International trade, average 1934-38, annual 1940-47

Country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
		Oranges, including tangerines							
Importing Countries:									
Canada	2,707	3,387	3,691	4,290	5,550	6,199	6,236	6,052	5,607
Panama Canal Zone	7	9	20	41	50	42	51	-	-
Bahamas	6	6	7	6	4	3	3	3	-
Curacao (Neth. West Indies) 4/	32	387	61	49	48	2	1	-	-
United Kingdom 1/	16,504	13,004	2,688	3,351	1,449	5,300	9,780	8,533	13,060
Germany 15/	6,002	2,652	10,844	5,135	4,076	948	-	-	-
France	7,892	5,999	3,544	3,060	32	34	209	1,385	2,995
Netherlands 1/	2,266	1,554	339	81	154	-	-	546	1,288
Belgium	2,326	1,004	600	61	44	100	2	2,291	4,124
Sweden 1/	1,165	792	711	383	743	984	443	2,790	2,165
Switzerland	837	734	509	372	651	589	245	1,078	1,295
Czechoslovakia	753	130	528	409	133	64	-	-	-
Norway	723	282	139	61	51	35	124	557	618
Hungery	418	409	539	398	197	0	0	-	-
Poland	703	-	-	-	-	-	-	-	-
Denmark	239	265	73	70	35	72	153	214	1
Yugoslavia	206	-	-	-	-	-	-	-	-
Finland	210	4	96	26	35	0	1	-	-
Eire	519	350	53	46	78	31	82	652	743
Iceland	6	1	1	11	2	1	8	35	-
Bulgaria	38	58	31	18	10	3/	0	-	-
Austria 16/	545	-	-	-	-	-	-	-	-
Rumania	237	225	79	94	50	5	-	-	-
U.S.S.R.	314	-	-	-	-	-	-	-	-
Malta	47	24	6/	6/	0	6/	80	-	-
Argentina	1,350	2,638	2,279	1,780	1,764	1,608	1,564	1,326	1,473
Chile	17	49	47	40	20	30	40	25	8
British Guiana	9	10	7	2	1	1	5	-	-
China	89	449	671	281	147	119	6/	333	7
Syria and Lebanon	219	659	47	254	648	992	505	364	271
Netherlands Indies	38	33	-	-	-	-	-	-	-
Indo China	74	40	21	0	-	-	-	-	-
Philippine Islands	146	187	140	-	-	-	1	454	357
Japan 17/	66	38	22	57	-	-	-	-	-
Korea 8/	889	1,356	1,035	950	729	-	-	-	-
Manchuria	1,086	-	-	-	-	-	-	-	-
Egypt	10	7	2	37	49	427	154	-	-
Mauritius	2	5	8	5	12	12	5	-	-
Canary Islands	1	-	-	56	47	42	55	-	-
Spanish Morocco	9	2	11	71	112	96	160	-	-
South West Africa	12	20	34	38	48	49	48	-	-
Southern Rhodesia	1	5	5	5	6	10	7	-	-
New Zealand	249	269	243	173	148	142	132	105	227
New Zealand 18/	63	131	121	51	44	43	0	-	-
Hawaii 19/	183	306	348	321	228	237	283	265	0
Total	49,215	37,480	29,594	22,083	17,395	18,217	20,377	27,008	34,239

CITRUS FRUIT: International trade, average 1934-38, annual 1940-47

Country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
			LEMONS						
Exporting Countries:									
United States 1/	452	487	525	486	474	501	569	536	484
United States 2/	18	29	35	14	21	24	29	22	19
Italy	6,169	5,695	5,459	4,401 5/	1,255 5/	777 5/	615	1,293	2,591
Spain 4/	762	226	165	51	661	763	577	311	177
Syria and Lebanon	254	90	7	1	15	4	7	77	16
Palestine	64	78	3/	1	2	6	61	173	200
Algeria	13	47	33	12	2	1	6 9/	53 9/	37
Cyprus	27	6	3/	3/	3/	1	19	30	30
Union of South Africa	36	4	11	21	0	2	2	12	6
Australia 12/	9	4	1	8	4	2	2	6 13/	11
Total	7,804	6,666	6,236	4,995	2,434	2,081	1,887	2,513	3,571
Importing Countries:									
Canada	375	408	442	417	460	483	552	516	483
Germany 15/	1,905	3,103	3,780	3,012	1,288	325	0	0	0
United Kingdom 1/	1,732	947	239	3/	11	518	859	669	916
France 1/	754	514	289	130	25	55	79	250	501
Czechoslovakia	448	278	324	258	136	18	0	0	0
Poland	329	-	-	-	-	-	-	-	-
Switzerland 1/	297	317	200	119	142	85	121	251	320
Austria 16/	251	-	-	-	-	-	-	-	-
Belgium 4/	168	102	90	39	16	26	42	179	300
Rumania	162	165	157	126	55	16	-	-	-
Netherlands 1/	105	125	65	86	57	6/	6/	19	117
Hungary	166	211	262	238	152	0	0	-	-
Yugoslavia	131	-	-	-	-	-	-	-	-
Denmark	71	113	65	60	43	11	42	160	154
Sweden	64	67	73	39	52	50	60	97	109
Turkey	92	56	15	20	15	0	0	-	-
Greece	14	0	0	0	0	0	3/	-	-
U.S.S.R.	141	-	-	-	-	-	-	-	-
Latvia	22	-	-	-	-	-	-	-	-
Lithuania	12	-	-	-	-	-	-	-	-
Eire	42	27	15	15	12	6	26	29	15
Bulgaria	28	49	41	44	15	4	4	-	-
Finland	15	13	17	25	7	3	0	-	-
Argentina	52	12	6	9	18	3	5	1	8
Syria and Lebanon	3/	0	3	0	3/	1	44	2	29
China	5	6	3	1	3	4	-	-	-
New Zealand	8	12	7	6	6	2	9	9	9
Hawaii 19/	18	29	35	14	21	24	29	22	19
Total	7,467	6,554	6,128	4,658	2,534	1,634	1,872	2,204	2,980

Country	Average 1934-38	1940	1941	1942	1943	1944	1945	1946	1947
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
			GRAPEFRUIT						
Exporting Countries:									
United States 1/	948	770	802	931	1,117	1,221	1,498	2,280	2,430
United States 2/	17	31	53	9	23	26	30	26	28
Puerto Rico 19/	287	120	53	14	0	0	1	3/	0
British Honduras	29	56	6	3/	6	3	2	1	2
Cuba	162	151	149	42	51	61	10	38	81
Dominica	4	3	9	3	5	8	7	5	-
Honduras	18	12	6	20	2	0	0	-	-
Jamaica	144	45	12	4	3/	4	4	30	70
Trinidad and Tobago	49	124	34	3	3/	2	2	4	-
Brazil	123	1	16	0	0	3/	0	-	-
Palestine	4/ 1,331	725	10	69	98	130	532	893	953
Cyprus	10	6	3	11	4	4	42	58	145
Algeria 1/	4/ 89	375	132	24	2	3/	64 9/	27 9/	23
Union of South Africa	344	267	1	3/	3/	0	275	320	349
Australia 12/	2	4	2	2	0	3/	3/	4 13/	6
Total	3,557	2,690	1,288	1,132	1,308	1,459	2,467	3,686	4,087
Importing Countries:									
United States	82	160	149	44	24	49	10	34	75
United States 20/	287	120	53	14	0	0	1	3/	0
Canada	558	717	795	824	1,054	1,121	1,333	1,778	1,552
Denmark	9	3	3/	3/	0	1	9	20	0
Eire	35	13	1	1	1	3/	3/	36	17
Germany 15/	31	7	50	223	63	-	-	-	-
France	4/ 107	44	3/	3/	0	0	3/	3	-
Netherlands	4/ 57	45	0	0	0	6/	6/	5	27
Sweden	4/ 37	22	3	2	3	6	6	104	69
United Kingdom 1/	1,624	820	19	3/	1	3/	688	1,019	2,032
Belgium	4/ 193	86	1	0	0	0	3/	190	323
Czechoslovakia	18	3/	0	0	0	0	0	-	-
Syria and Lebanon	0	15	3/	4	20	38	15	3	2
Egypt	4	3	6	21	36	5	13	-	-
Philippine Islands	12	11	5	6/	6/	6/	3/	3	4
New Zealand	4/ 7	11	2	2	1	1	6	3/	2
Australia 12/	11	21	1	3/	0	0	0	-	-
Hawaii 19/	17	31	53	9	23	26	30	26	28
Total	3,089	2,129	1,138	1,144	1,226	1,247	2,091	3,221	4,131

1/ Net trade. 2/ Trade with Hawaii. 3/ Less than 500 boxes. 4/ Less than 5 years. 5/ Exports from Sicily, only. 6/ Not available. 7/ Trade with Korea. 8/ Trade with Japan. 9/ Crop year. 10/ Includes Egyptian Sudan. 11/ All citrus. 12/ Year beginning July 1. 13/ 9 months. 14/ Trade with New Zealand. 15/ Includes Austria 1940-45. 16/ Included with Germany 1940-45. 17/ Trade with Formosa. 18/ Trade with Cook Islands. 19/ Trade with United States. 20/ Trade with Puerto Rico.

Prepared and estimated on the basis of official statistics of foreign governments, reportr of United States Foreign Service officers, results of official research and other information.

in the comparable period last season. Production in California and Arizona is now estimated at around 2.6 million boxes each. Production in Texas was sharply reduced by January freezes and the estimated 14.5 million is far below the 23.2 million produced last year.

Palestine, because of hostilities, has a crop of only 1,000,000 boxes, 500,000 less than last year's crop and the prewar average.

Lemons.- The United States is also the largest producer of lemons, producing 8.9 million boxes or 31 percent below the 1947 crop of 12.9 million and 7 percent below the 1935-39 average of 9.6 million. The lemon crop in the United States was severely damaged by freezes in January. All early bloom and advanced buds were killed by the freeze but the extent of damage to next year's crop is not known.

Italy is the largest producer in Europe and has an estimated crop of 7.0 million boxes, as compared with 8.1 million last season and 9.6 million for the prewar average. Indications are for a large crop in South America estimated at 2,365,000 boxes, as compared with 1,983,000 last season and 623,000 prewar.

Limes.- Lime production in the world has remained rather constant for the last few years and is estimated at around 3 million boxes. The largest producer is Mexico with an indicated yield of 1,653,000 boxes for 1948, 2 percent below the 1947 crop of 1,684,000 but 254 percent above the prewar average of 652,000. Egypt ranks second with a yield of 775,000 boxes. Dominica, in the British West Indies, ranks third with a production of 210,000 boxes, and the United States fourth with 200,000.

This is one of a series of regularly scheduled reports on world agricultural production and trade prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Gustave Burmeister, Eric B. Shearer, Afif I. Tannous, Ruth G. Tucker, and Marguerite Golden.

INTERNATIONAL TRADE IN CITRUS

Orange exports for the calendar year 1947 from the principal exporting countries of the world are indicated to be about 32.8 million boxes, one-third less than the prewar average of 49.6 million boxes but 93 percent more than the lowest in recent year (1943) of 17.0 million boxes.

Of the United States exports, Canada received 5.4 million boxes or 65 percent, Belgium 1.3 million or 16 percent, the Philippines, Sweden and Hong Kong about 5 percent each and the remainder to various countries.

In Palestine, about 68 percent or 4.6 million of the total 6.8 million boxes were shipped to the United Kingdom. The remainder was exported principally to Europe with Belgium taking 750,000 boxes, Sweden 358,000, Norway 280,000, Eire 226,000, Czechoslovakia 113,000, Holland 120,000, Switzerland 4,000 and the balance to other countries.

Exports from Spain for 1947 amounted to 5.5 million boxes of which the United Kingdom received 2.6 million or nearly 50 percent, Belgium 1.2 million and The Netherlands and Sweden most of the remainder. Italy's exports amounted to 3.5 million boxes, of which Switzerland bought 1.1 million, Belgium .8 million and Sweden .6 million boxes. Exports from Brazil amounted to 1.7 million boxes and went principally to Argentina.

Imports of oranges for the same calendar year amounted to 34.2 million boxes, as compared with 49.2 million prewar and with the lowest recent year (1943) of 17.4 million.

The United Kingdom is the world's largest importer of oranges and in 1947 imported 13.2 million boxes, which was 20 percent below the imports for prewar of 16.6 million. In 1947 the United Kingdom received 6.8 million boxes from Palestine, 2.5 million from South Africa, 2.6 million from Spain and the remainder in small amounts from other countries. Canada imported 5.6 million boxes, principally from the United States. Imports into Belgium amounted to 4.1 million boxes, of which the United States furnished 1.5 million, Spain 1.0, Palestine .8 million, Italy .3, Brazil .2 and other .3 million boxes. Sweden imported 2.2 million boxes, of which Italy and Spain each accounted for .6 million, Palestine .4 million, United States and others .3 million each. Nearly the entire 3.0 million imported by France came from her overseas possessions.

World trade in grapefruit for 1947 amounted to around 4 million boxes, 15 percent above the prewar average of 3.6 million boxes. World trade in grapefruit reached its lowest point in 1942 when it amounted to 1.1 million boxes. The largest exporter of grapefruit is the United States, exporting in 1947, 2.4 million boxes of which 1.6 million went to Canada, .5 to the United Kingdom, Belgium .2 million and .1 to other countries. Great Britian, Belgium, Eire with 826,000, 86,000 and 22,000 boxes respectively, accounted for most of the export crop of 953,000 boxes from Palestine. The United Kingdom imported 2.0 million boxes in 1947 of which Palestine furnished 1.1 million, United States .5 million, South Africa .2 million and .2 from other countries. Canada imported 1.6 million boxes in 1947, of which the United States furnished 1.5 million.

International trade in lemons during 1947 amounted to around 3 million boxes, which was a little less than one-half the prewar figure of about 7 million. Italy was the largest exporter of lemons and in 1947 exported 2.6 million boxes, distributed as follows: United Kingdom 667,000, Czechoslovakia 504,000, France 322,000, Switzerland 291,000, Belgium 196,000, Denmark 116,000, Austria 64,000, Netherlands 84,000 and the remainder in small amounts to other countries. The United States exported 484,000 boxes, mostly to Canada. The United Kingdom imported 916,000 boxes in 1947.

This is the first published report on International Trade in Citrus Fruit available since September, 1945. Information on international trade in citrus fruit in 1948 is not yet sufficient for the preparation of a report.

1948 FOREIGN RAISIN PRODUCTION ESTIMATE INCREASED 1/

The 1948 preliminary estimate of raisin production outside of the United States is now estimated at 239,400 short tons compared with 156,500 tons in 1947 and 206,700 tons in 1946. The commercial pack in these countries is about 11 percent above the 5-year (1942-46) average of 214,900 tons and 10 percent above the 10-year (1937-46) average of 216,700 tons. The present pack is the largest since 1943 when 244,500 tons were produced in these countries.

The present estimate of the California pack is 223,000 short tons which is down from the early season indications. The world pack is now estimated at 462,400 tons compared with 459,500 tons in 1947 (revised) and 399,700 tons in 1946 (revised). The estimate for the world production is about 7 percent below the 5-year (1942-46) average of 494,600 tons and 2 percent below the 10-year (1937-46) average of 472,700 tons. The United States production represents about 48 percent of the world total compared with 66 percent in 1947 and 48 percent in 1946.

The greatest increase in production over the previous season occurred in Turkey where the pack turned out to be even larger than indicated last fall. The Spanish pack while by no means a record one was somewhat larger than anticipated earlier. A decline in estimated production for 1948 is now recorded for Iran, Australia, and the United States.

The 1948-49 marketing season to date has not been as active as expected for a number of reasons. In Turkey the season started with considerable activity which soon ceased, however, when the expected large British order failed to come up to expectations. In Greece, the market has been somewhat confused because the government was unwilling to meet the prices demanded by growers. There was no difficulty in disposing of the Australian pack because of the long term purchase agreements with the United Kingdom. The export business in Iran has not been overly active so far this season.

At mid-season, on the basis of available information about 70,200 short tons of raisins remained unsold or 19 percent of the total foreign estimated production. Turkey is reported to have had about 40,000 tons, Greece 15,000 tons, Iran 11,000 tons and the balance were in Spain. Turkey is the only one of these countries that expects to dispose of the entire pack before new-crop raisins become available this fall. Greece is expected to work off a substantial tonnage in view of the recent deal with western Germany to sell $560,000 worth of dried fruit to that area.

The Southern Hemisphere countries now about ready to harvest the 1949 grape crop are expected to produce a slightly larger pack than in 1948. Australia, on basis of preliminary reports is expected to have a 75,000 pack compared with 70,100 in 1948. A possible increase of 100 tons is expected in Chile and a possible minor increase in the Union of South Africa. The Australian and British governments

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1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

RAISINS: Estimated world commercial production, 1948 ~~with comparisons~~
(Rounded to nearest 100 short tons)

Year	Argentina	Australia		Chile	Greece	Iran
		Lexias	Sultanas			
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average						
1942-46	5,500	10,200	63,400	1,500	17,100	33,600
1937-46	5,200	9,800	61,300	1,700	23,600	34,500
Annual						
1944	7,100	12,000	76,400	900	17,600	33,000
1945	3,600	9,800	46,700	900	9,400	33,000
1946	4,400	7,900	57,500	1,300	20,900	35,800
1947 b/	5,000	6,000	44,500	1,000	26,400	22,000
1948 b/	7,700	5,800	a/ 64,300	700	25,300	a/ 41,800

Year	Spain	Turkey (Smyrna)	Union of South Africa	Foreign total	United States	Total all
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average						
1942-46	8,700	62,700	12,200	214,900	a/ 279,700	a/494,600
1937-46	9,400	59,800	11,400	216,700	a/ 256,000	a/472,700
Annual						
1944	10,400	49,500	12,200	219,100	309,500	528,600
1945	8,600	71,500	11,500	195,000	241,000	436,000
1946	6,100	60,500	12,300	206,700	a/ 193,000	a/399,700
1947 b/	11,300	30,800	9,500	156,500	a/ 303,000	a/459,500
1948 b/	a/ 7,400	a/ 77,000	a/ 9,400	a/ 239,400	a/ 223,000	a/462,400

CURRANTS: Estimated world commercial production, 1948 with comparisons
(Rounded to nearest 100 short tons)

Year	Australia	Greece	South Africa	Total
	Short tons	Short tons	Short tons	Short tons
Average				
1942-46	22,300	51,600	1,100	75,000
1937-46	22,900	87,200	1,000	111,100
Annual				
1944	28,400	55,000	1,100	84,500
1945	19,700	41,800	1,100	62,600
1946	15,700	62,200	1,200	79,100
1947 b/	12,700	84,500	1,000	98,200
1948 b/	19,300	a/ 84,700	1,100	a/ 105,100

a/ Revised.
b/ Preliminary.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research or other information.

UNITED STATES: Exports of raisins to specified countries, 1947-48 with comparisons

(Crop year basis, September - August)

Country of destination	Average 1943/44-1947/48	1944-45	1945-46	1946-47	1947-48	a/1948-49
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Austria	548	0	0	b/	2,740	551
Belgium	2,029	1,784	1,209	657	6,497	414
Denmark	11	0	0	1	56	8
France	146	192	1	6	530	32
Germany	15,899	0	29	0	79,465	5,155
Ireland	977	0	2,211	2,673	0	0
Netherlands	870	2,975	918	257	198	57
Norway	267	1,326	0	b/	9	b/
Poland	40	0	b/	b/	202	1
Sweden	584	b/	526	2,390	4	0
United Kingdom	43,813	68,284	25,751	25,475	2,035	6
Other Europe	852	1,503	343	573	1,222	290
Total Europe	66,036	76,064	30,988	32,032	92,958	6,514
Canada	12,494	15,777	11,317	220	21,185	5,293
All other countries	6,910	4,522	7,084	8,255	9,404	2,600
Total	85,440	96,363	49,389	40,507	123,547	14,407

Compiled from official records of the Bureau of Census.

a/ 4 months, September through December 1948.
b/ Less than one-half ton.

have signed another long-term purchase contract which will run for 5 years. This contract assures the Australian growers a market at a fixed price for the duration of the contract.

The export season, as far as the United States is concerned, has been rather slow. During the first quarter of the season only 14,407 tons had been exported, of which 5,155 tons were to Germany, and 5,293 tons to Canada.

More exports were made in January, however. Statistics on these are not yet available. The dollar shortage in most European countries continues to retard sales to that part of the world. The European Recovery Program and other programs are making it possible to move some tonnages this season.

WORLD PRODUCTION OF FATS AND OILS SLIGHTLY BELOW PREWAR [1]

World production of fats and oils from the important vegetable and animal sources in 1948 is estimated to be less than 21 million tons in terms of oil, a production slightly greater than in 1947, but still nearly 4 percent below the prewar level. The more favorable production in 1948, much of which will be available for consumption during 1949, has eased the fats and oils situation in many areas.

Shipments in 1948 of the raw materials and fats and oils from producing countries were slightly less than 4 million tons. This volume of fats and oils was greater than the movement in 1947, but was only 61 percent of the prewar shipments of 6.5 million tons. Some relaxing of controls over the movement of fats and oils has probably resulted in freer trade in these commodities. Shipments during 1948 were at a level considerably higher than was anticipated on the first of the year.

Supplies of fats and oils and the raw materials available for international trade in 1949 are expected to be considerably greater than the movement estimated for 1948. If the expected quantity of fats and oils to be derived from vegetable oilseeds produced in 1948 and from the palm oils and animal fats produced in 1949 are made available for export, total shipments from these supplies may exceed the 1948 shipments by more than 600 thousand tons.

The production of oilseeds such as cottonseed, peanuts, soybeans, and sunflower, which are the primary source of the edible vegetable oils, increased considerably in 1948 due primarily to exceptionally good growing conditions in the Northern Hemisphere. The production of olives for oil in 1948-49 was, however, less than 40 percent of the previous year's production. The large olive crop produced in 1947-48 relieved a critical supply situation in the Mediterranean countries during the first part of 1948 and supplies carried over from the 1947-48 crop will, in some measure, compensate for the short olive crop for 1948-49. Nevertheless, some of the important olive oil producing countries will require imports of other vegetable oils until olive oil from the 1949-50 crop is available.

Total production of the oils included in the palm oil group, primarily, coconut oil, palm oil, and palm kernel oil was approximately the same as in 1947. A smaller production in the Philippines in 1948 was offset by a general increase in the output of copra from Indonesia and the South Pacific Islands, recovery of production in the Netherlands Indies, and a return to full copra production in Ceylon. Production of palm oil in the Belgian Congo increased slightly and a very significant recovery was made in the production of palm oil in the Netherlands Indies. The rehabilitation of the palm oil plantations in Sumatra will, if continued, result in a larger supply of palm oil available for export during 1949.

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[1] A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

Production of industrial and drying oils in 1948 was generally greater than during the preceding year, and for most types of oils the production exceeded the average of the prewar period. A record crop of flaxseed in North America more than offset a smaller production in South America, resulting in one of the world's largest crops. The movement of linseed oil and flaxseed into international trade during 1948 was much lower than in 1947; consequently, most of the supplying countries are now carrying heavy stocks, either of flaxseed or linseed oil, which will be available for export durng 1949. The harvest of castor beans in Brazil set a new record, and although production in 1949 may not equal that of 1948, world supplies should at least be as great as they were before the war. The production of rapeseed, concentrated largely in the Asiatic countries, is reported to be only slightly less than the very large crop of 1947. As this oil has a wide range of industrial and food uses, only a small proportion of the total production enters international trade. The production of tung oil in China is reported to be considerably greater than during any of the post-war years and has approached the prewar level. Exports of tung oil during 1948 were approximately the same as the prewar average. Shipments of perilla from Manchuria have practically ceased and little perilla oil entered international trade during 1948.

Despite the large supplies of drying oils available, exports during 1948 were approximately 50 percent of the prewar shipments. Lack of purchasing power on the part of some importing countries and restrictions against the export of seed from exporting countries tended to restrict the volume of seed or oil entering international trade.

The production of animal fats in 1948 was probably slightly less than the production of the previous year, and about 10 percent below the prewar production. Production of slaughter fats in Europe is still restricted by reduced numbers of livestock and lack of feed. The favorable crop season of 1948 should improve the European animal fat situation. Production of butter in North America has not regained its prewar level due primarily to the heavy consumption of whole milk. Lard production in the United States declined somewhat during 1948. The output of lard should increase particularly in the latter part of 1949. Tallow production in the world continues at a high level and the output in 1948 was considerably greater than that of the previous year. Exports of tallow in 1948 were greater than they were in 1947. On the other hand lard exports in 1948 were less than they were in 1947, and foreseeable supplies indicate exports in 1949 somewhere between quantities shipped in 1947 and 1948. Production of marine oils has increased slightly, due primarily to an increase in the whale oil output of 1948. The number of whales taken is still limited by international agreement, and except for the catch by a limited number of land stations, production of whale oil during the next few years is unlikely to exceed that of 1948 or 1949. The fishing industry has not yet recovered to the point where fish oil production is equal to prewar.

Fats and Oils: Estimated World production a/, 1948 with comparisons
(1,000 short tons)

Commodity	Total in oil or fat equivalent			
	Average 1935-39	1946	1947	1948
Edible vegetable oils:				
Cottonseed	1,670	1,156	1,322	1,547
Peanut	1,659	1,676	1,837	1,915
Soybean	1,345	1,514	1,555	1,712
Sunflower	630	683	818	965
Olive oil	960	820	1,300	560
Sesame	681	590	635	697
Total	6,945	6,439	7,467	7,396
Palm oils:				
Coconut	1,610	760	1,300	1,200
Palm kernel	385	283	315	360
Palm oil	680	400	520	610
Babassu kernel	30	38	44	48
Total	2,705	1,481	2,179	2,218
Industrial oils:				
Flaxseed	1,160	900	1,092	1,252
Castor-bean	202	188	185	230
Rapeseed	1,362	1,583	1,667	1,629
Oiticica oil	10	17	7	20
Tung oil	150	100	130	145
Perilla seed	65	14	10	10
Total	2,949	2,802	3,091	3,286
Animal fats:				
Butter	3,700	2,770	2,850	2,900
Lard	3,000	2,390	2,850	2,670
Tallow	1,450	1,625	1,805	1,880
Total	8,150	6,785	7,505	7,450
Marine oils:				
Whale	585	159	377	397
Fish	315	160	212	209
Total	900	319	589	606
Estimated world total	21,649	17,826	20,831	20,956

a/ The production for each commodity was determined by estimating the percentage of each used as visible fats and oils. Allowances were made for seed, feed, and oilseeds consumed directly for human food. Since export figures are the only reliable data available for most palm oils, an additional percentage was added for local consumption in order to arrive at total production. The following percentages were used in arriving at total production of visible fats and oils:

Percentage	Commodities	Percentage	Commodities
125	Copra, palm oil	90	Sunflower seed, Rapeseed, flaxseed, perilla
110	Palm kernels		
100	Olive oil, babassu, oiticica, tung, lard, tallow, whale, fish	85	Sesame
		81	Butter
		75	Cottonseed
95	Castor-beans	65	Soybeans
		60	Peanuts

Fats and Oils: World exports, 1949 with comparisons
(1,000 short tons)

Commodity	Total in oil or fat equivalent			
	Average 1935-39	1947	Estimate 1948	Forecast 1949
Edible vegetable oils:				
Cottonseed	190	54	75	90
Peanut	852	447	470	500
Soybean	440	78	65	105
Sunflower	32	70	62	120
Olive oil	174	14	56	20
Sesame	65	23	20	20
Total	1,753	686	748	855
Palm oils:				
Coconut	1,290	1,040	960	1,100
Palm kernel	350	286	325	335
Palm	545	320	350	440
Babassu kernel	20	9	22	22
Total	2,205	1,655	1,657	1,897
Industrial oils:				
Linseed	714	327	250	350
Castor	101	115	103	100
Rapeseed	45	7	6	10
Oiticica	4	6	10	10
Tung	a/ 89	90	89	90
Perilla	40	0	0	0
Total	993	545	458	560
Animal fats:				
Butter	b/ 460	270	320	330
Lard	190	216	173	200
Tallow	195	166	190	200
Total	845	652	683	730
Marine Oils:				
Whale	584	283	323	440
Fish	150	67	92	90
Total	734	350	415	530
Grand total	6,530	3,888	3,961	4,572

a/ 1933-37 average.
b/ 1934-38 average.

These estimates include the greater part of the fats and oils materials produced in the world, and indicate a production in 1948 slightly below production during the prewar period.

Production of the annual vegetable oilseeds in 1949 cannot be forecast at this time, and will be influenced by growing conditions during the season. Considering the small crop of olives for oil in 1948, the production should recover in 1949 and the supply of edible vegetable oils should continue the upward trend.

As the producing areas in the Philippines have recovered from the effects of the December 1947 typhoons and as the production in the Netherlands Indies continues to increase, production of copra and coconut oil should be greater in 1949 than it was in 1948. A number of palm oil plantations in the Netherlands Indies were producing effectively late in 1948, and an increase of palm oil production during 1949 is to be expected. Supplies of industrial oils, in so far as these are drawn from the 1948 crop, should be ample during the next year. As a result of the favorable crop conditions over much of the world in 1948, production of butter and slaughter fats should improve during the next 12 months. Considering the supply of oilseeds available from the 1948 crops for utilization in 1949, the upward trend in production of the palm oils and animal fats, supplies available for export in 1949 are expected to exceed the export supplies in 1948 by 600 thousand tons.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Production. For this report, the Committee was composed of Joseph A. Becker, Chairman, Russell S. Kifer, Regina H. Boyle, and Charalambos S. Stephanides.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

U.S. EXPORTS MORE RICE IN DECEMBER

United States rice exports during December amounted to 147 million pounds as compared with 118 million in November and 91 in December a year earlier. Of these exports, 66 percent was shipped to Cuba and 26 percent to the Netherlands Indies. Six million pounds of the other consignments went to Saudi Arabia, and 2 million to Liberia.

August-December exports of the 1948 crop equaled 408 million pounds, a decrease compared with 435 million in the same period of the preceding year. Deliveries were about average for that time of the season, however, as they compare with an unusually heavy volume exported in the same period of the year before.

RICE: United States exports to specified countries, December 1948, with comparisons a/

Continent and country	August-July		August-December		December	
	1937-38 to 1941-42	1947-48 b/	1947 b/	1948 b/	1947 b/	1948 b/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Europe	43	22	1	16	c/	1
Cuba	275	527	376	277	71	97
Canada	19	54	40	18	16	1
Br. West Indies	c/	11	2	3	2	c/
China	d/	203	0	12	0	c/
Korea	d/	54	9	4	1	0
Netherlands Indies	d/	1	c/	63	0	38
Other countries	21	23	7	15	1	10
Total	358	895	435	408	91	147

a/ Includes milled rice, brown, broken, screenings and rough rice converted to milled at 65 percent. b/ Preliminary c/ Less than 500,000 pounds. d/ If any, included in "other countries".
Compiled from official records, Bureau of the Census.

DROUGHT REDUCES PERU'S RICE ACREAGE

Water supplies in Peru's principal rice-growing area are insufficient at present for planting a large rice crop, according to a report from C. A. Boonstra, Agricultural Attache, at Lima. Planting cannot be delayed beyond mid-February, and unless the water situation improves the harvest may be the smallest in several years.

The maximum crop forecast for 1949, assuming an improvement in water supplies, is 7,350 million bushels of rough rice (215 million pounds milled) compared with the unofficial estimate of the preceding year's record of 9,800 million bushels (285 million pounds). The area planted may not exceed 124,000 acres compared with the estimate of 148,000 acres in 1948. Lower yields also are predicted as a result of the late planting and deficient water supplies.

Peruvian demand for rice is increasing more rapidly than production, and the record crop of 1948 is failing to meet the requirements. It is estimated that consumers would take 31 million pounds of milled rice per month if supplies were freely available at present official prices. The monthly quantity now distributed is 26 million pounds.

Rice imports during 1948 amounting to 10 million pounds were received from Ecuador to relieve a shortage early in the year. No rice was imported in the second half of 1948. Supplies are adequate to meet essential needs until mid-1949, but a shortage may occur thereafter if present prospects for a small crop are realized.

(Continued on Page 156)

FATS AND OILS

CANADA'S HERRING OIL PRODUCTION UP IN 1948

Canada's production of 12,674 short tons of herring oil in 1948 is twice the 1947 production and almost three times the prewar production.

The Pacific herring landings were over 40 percent higher in 1948 than in 1947 and higher than in any recent year, due to heavy runs of herring and more intensive fishing operations On the Pacific Coast the most significant development was the diversion of herring from canning to the production of oil and meal with the beginning of the 1948-49 season. Almost 95 percent of the 1948 Pacific herring catch is being utilized for production of oil and meal in contrast with the preceding several years when large quantities were canned.

Whaling operations in Canada abandoned in 1943 were resumed during the spring of 1948, and 182 whales were taken as compared with the 274 average catch for the 6-year period 1935-1941. A total of 1,474 tons of whale oil were recovered from the 1948 catch. All of this amount was sold in the domestic market. Whaling operations in Canada are in a position to expand; therefore, the 1949 catch is expected to be greater than in 1948.

CANADA: Fish and whale oil production, 1948 with comparisons 1/

Type of oil	Prewar 5-year average 1935-39	1947 Atlantic	1947 Pacific	1947 Total	1948 Atlantic	1948 Pacific	1948 Total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Herring........	4,480	400	5,621	6,021	150	12,524	12,674
Salmon.........	581	-	424	424	-	274	274
Other fish.....	2/7,351	144	326	470	63	255	318
Cod liver......	753	439	-	439	558	-	558
Other liver....	-	24	-	24	20	-	20
Whale..........	270	-	-	-	-	1,474	1,474
Sperm..........	-	-	-	-	-	108	108

1/ Excluding Vitamin Oils. 2/ Pilchard oil - 6,258 tons.
Compiled from official sources.

Imports of fish and whale oils into Canada decreased during the first 8 months of 1948 compared to the same period last year, and exports of Canadian fish oils increased greatly during the 9-month period ending September 30, 1948 when contrasted with those of the same period in 1947.

If fish oil prices follow general fats and oils prices in Canada, a slight reduction in price will result. Marine oils have risen rapidly in relation to prewar prices. Increased quantities of fish oils may be used for soap manufacture if tallow supplies become limited; however, a smaller quantity may be used in paints and varnishes if more soybean oil is available.

U.S. EXPORTS OF SPECIFIED FATS, OILS, AND OILSEEDS

The following table shows United States exports of specified fats, oils, and oilseeds during 1948 with comparisons:

UNITED STATES: Exports of specified fats, oils, and oilseeds, 1948 with comparisons

Commodity	Unit	Average 1935-39	1946	1947 a/	1948 a/
Soybeans	1,000 bu.	b/ 4,793	2,906	2,505	6,497
Soybean oil:					
Refined	" lbs.	c/ (6,647	72,583	38,883	41,266
Crude	" "		13,228	68,395	41,769
Coconut oil:					
Refined	" "	3,789	935	5,491	9,273
Crude	" "	10,442	47,366	52,427	9,820
Cottonseed oil:					
Refined	" "	4,793	5,857	10,977	22,672
Crude	" "	1,515	244	901	10,094
Flaxseed	1,000 bu.	c/	20	16	1,650
Linseed oil	1,000 lbs.	1,280	1,625	9,854	29,636
Peanuts:					
Shelled	" "	c/ (452	61,043	212,253	458,655
Not shelled			7,066	18,681	10,594
Peanut oil, refined	" "	d/ 325	75	1,579	685
Cooking fats	" "	2,111	11,424	3,594	3,522
Lard	" "	165,636	430,682	380,735	271,835
Oleomargarine	" "	180	50,483	19,954	3,408
Tallow:					
Edible	" "	c/(1,651	4,151	601	1,377
Inedible	" "		6,472	54,553	67,995

a/ Preliminary. b/ Average of less than 5 years.
c/ Not separately classified in Foreign Commerce and Navigation.
d/ 1939 only.

Compiled from official sources.

U. S. IMPORTS OF SPECIFIED VEGETABLE OILS AND OILSEEDS

The following table shows United States imports of specified vegetable oils and oilseeds during 1948 with comparisons:

UNITED STATES: Imports a/ of specified oils and oilseeds, 1948 with comparisons.

Commodity	Unit	Average 1935-39	1946	1947 b/	1948 b/
Babassu kernels	1,000 lbs.	c/	39,463	22,233	61,929
Babassu oil	" "	d/ 346	2,314	1,747	3,082
Castor-beans	" "	132,924	226,295	276,807	302,511
Castor oil	" "	226	6,450	6,595	2,441
Flaxseed	" bu.	18,470	3,394	282	1,066
Linseed oil	" lbs.	713	94,405	117,326	3,959
Copra	Short tons	230,000	394,696	677,660	447,743
Coconut oil	1,000 lbs.	342,717	2,353	23,559	109,096
Oiticica oil	" "	d/ 7,673	22,593	8,471	17,558
Olive oil:					
Edible	" "	62,811	12,660	11,250	36,093
Inedible	" "	35,448	103	248	9,775
Palm oil	" "	321,482	37,850	63,212	63,328
Sesame seed	" "	58,425	4,891	9,479	22,606
Tea seed oil	" "	13,159	88	6,377	3,601
Tucum kernels	" "	e/ 9,810	12,709	16,887	11,619
Tung oil	" "	123,190	36,207	121,564	133,282

a/ Imports for consumption. b/ Preliminary. c/ Not separately classified in Foreign Commerce and Navigation. d/ Average of less than 5 years. e/ 1939 only.

Compiled from official sources.

PHILIPPINE COPRA EXPORTS IN JANUARY LOWEST SINCE MARCH 1946

Philippine copra exports in January--nearly 23,800 long tons-- were the lowest for any month since March 1946, when shipments totaled 13,300 tons. The quantity exported was lower by 72 percent than the 85,000 tons shipped in January 1948. The United States was the destination for 85 percent of the tonnage with most of the balance booked for France and Venezuela.

A marked improvement in the world's fats and oils situation in recent months, with rapidly-falling prices and uncertainty regarding future marketing conditions, probably explains why shipments in January were relatively small. Local buying prices in producing regions the first part of December were $229- $249 per long ton. Comparable prices in February were $132 - $147. This represents a drop of more than 40 percent in two months.

The Philippines exported 1,633 long tons of coconut oil in January. This quantity, all of which was sent to the United States, represents a decline of nearly one-half from the 3,140 tons exported in January 1948 and is the smallest monthly export since prior to 1948.

PHILIPPINE ISLANDS: Copra exports, January 1949 with comparisons
(Long tons)

Country a/	Copra distribution				
	Average 1935-39	1947	1948 b/	January 1948 b/	January 1949b/
United States (total)	206,801	585,620	364,102	48,519	20,147
Atlantic Coast	-	116,034	61,618	1,000	4,087
Gulf Coast	-	77,155	69,320	11,003	5,723
Pacific Coast	-	392,431	233,164	36,516	10,337
Canada	-	16,607	17,049	2,700	-
Costa Rica	-	-	100	-	-
Mexico	7,260	1,500	-	-	-
Panama Canal Zone	-	200	707	-	320
Panama, Republic of	-	809	1,357	-	209
Colombia	-	5,300	6,995	850	-
Venezuela	-	7,862	3,868	-	1,133
Austria	-	6,000	6,000	-	-
Belgium	10	10,306	1,000	-	-
Czechoslovakia	-	7,676	-	-	-
Denmark	6,025	44,823	26,536	900	-
France	24,589	73,232	65,912	5,475	1,457
Bizonal Germany	7,309	11,220	17,250	-	-
Italy	4,079	26,076	21,900	5,550	-
Netherlands	28,415	7,962	8,949	-	-
Norway	91	15,719	9,276	97	-
Poland	-	21,762	31,749	1,500	-
Sweden	4,183	11,898	4,748	1,020	-
Switzerland	-	12,379	1,000	-	-
United Kingdom	80	24,250	-	-	-
Yugoslavia	-	13,283	-	-	-
India	-	13,200	-	-	-
Japan	1,047	16,100	24,339	18,339	-
Palestine	-	7,510	-	-	-
Syria	-	-	1,443	-	-
Egypt	1,271	3,560	-	-	-
French Morocco	-	6,050	-	-	-
Union of South Africa	-	16,579	-	-	512
Others	8,678	949	c/ 11,350	-	-
Total	299,838	968,432	625,630	84,950	23,778

a/ Declared destination. b/ Preliminary. c/ Temporary destination is Trieste.

American Embassy, Manila.

TOBACCO

BELGIUM TOBACCO PRODUCTION REDUCED; IMPORTS INCREASED

Belgian tobacco production has declined, and imports have increased over recent years, according to the American Embassy in Brussels. Tobacco production in Belgium in 1948 totaled 6.3 million pounds compared with 13.4 million pounds in 1947, while imports of leaf tobacco totaled 43.3 million pounds in 1948 compared with 39.7 million pounds in 1947. In the prewar period, 1934-38, production averaged 17 million pounds annually, while imports averaged 42 million pounds annually.

Belgian tobacco plantings in 1948 totaled only 4,070 acres compared with 6,437 acres in 1947 and 11,611 acres in 1946. During the prewar period, 1934-38, plantings averaged 6,807 acres annually. Plantings will probably remain at a relatively low level because of the lowering of the Belgian tobacco import duties from 5 france per kilogram (5.2 cents per pound) to 4.13 francs per kilogram (4.2 cents per pound) on unstemmed leaf. The reduction in import duties should lower prices for domestic leaf thereby creating more competition for the use of land suited for tobacco. Most other crops which compete with tobacco for the use of land are still selling at high prices in Belgium.

BELGIUM: Acreage and production of tobacco for selected years

Year	Acreage	Production
	acres	1,000 pounds
Average 1934-38	6,807	17,068
1946	11,611	24,074
1947	6,437	13,355
1948	4,070	6,303

In 1948, Belgium imported 29.6 million pounds of American leaf tobacco, or about 68 percent of total leaf imports, compared with 14.2 million pounds or about 34 percent of leaf imports during the period 1934-38. The success of American leaf in the Belgian market in recent years is partly due to the fact that Belgian smokers prefer it, but much of the shift to American leaf is due to the fact that very little tobacco is available from the Netherlands East Indies, where prior to World War II, Belgium obtained a good portion of its leaf tobacco imports. Prices have also been a factor, because low grade

United States leaf has sold at lower prices than has tobacco from several other areas, particularly from Oriental tobacco producing countries.

BELGIUM: Imports of leaf tobacco for selected years.

Year	Imports			Percent from U.S.
	United States	Other	Total	
	1,000 pounds	1,000 pounds	1,000 pounds	
Average 1934-38	14,222	27,796	42,018	33.8
1946	18,990	16,338	35,328	53.8
1947	25,344	14,350	39,694	63.8
1948	29,606	13,699	43,305	68.4

HUNGARY PLANS TO INCREASE TOBACCO ACREAGE

Hungary's agricultural production plans for 1949 call for an increase in tobacco acreage, according to the American Legation in Budapest. Tobacco plantings in 1949 of 52,614 acres are planned, compared with actual plantings in 1948 of 47,111 acres and 40,811 acres in 1947 and an average of 37,000 acres in the prewar period, 1935-39. Several new areas will be included in the acreage to be planted in 1949.

Other plans for 1949 concerning tobacco include plans for a new brand of pipe tobacco, and the investment of considerable capital in the tobacco industry. New investments will apparently be confined largely to the development of collecting centers and storage warehouses.

LIVESTOCK AND ANIMAL PRODUCTS

CANADIAN CATTLE EXPORTS TO UNITED STATES IN 1948

Cattle exports from Canada to the United States in 1948 totalled 461,808 head, according to United States sources. This number included both dutiable and non-dutiable cattle. It was the largest number to enter the United States from Canada since 1919 when 550,000 head were imported. The 1948 exports, however, are still considerably below the 1939, 1940 and 1941 combined exports of Canada and Mexico. Exports of Canadian feeder and slaughter cattle to the United States were suspended about mid 1942 which continued until August 16, 1948 when the restriction was removed. In the interim period, exports of Mexican cattle to this country had been discontinued in December of 1946, as a result of outbreaks of foot-and-mouth disease in Mexico.

CANADA: Cattle numbers in relation to exports of live cattle to United States, annually, 1935-48.

Year	Number of cattle	Imports of live cattle: 700 pounds and over: Cows for dairy purposes	Other	Total	Under 700 pounds: Under 200 pounds	200 to 699 pounds	Total	Total dutiable cattle	Breeding cattle	Total free and dutible cattle
	1,000 Head	Head	Head	Head	Head	Head	Head	Head	Head	Head
1935	8,539			59,930			52,790	112,720		
1936 1/	8,499	6,686	136,533	143,219	55,695	35,149	90,844	234,063		
1937	8,337	6,723	157,468	164,191	80,792	50,355	131,147	295,338		
1938	8,080	7,442	75,529	82,971	45,645	9,147	54,792	137,763		
1939 2/	8,091	8,570	172,753	181,323	81,832	11,229	93,061	274,384		
1940	8,224	9,595	125,004	134,599	74,681	10,076	84,757	219,356	12,904	232,260
1941	8,316	13,387	150,216	163,603	62,419	10,192	72,611	236,214	16,139	252,353
1942	8,249	19,509	115,475	134,984	53,015	9,033	62,048	197,032	16,107	213,139
1943	8,834	34,764	211	34,975	5,986	1,317	7,303	42,278	22,369	64,647
1944	9,506	33,624	164	33,788	5,551	1,038	6,589	40,377	16,748	54,125
1945	10,258	43,919	77	43,996	8,427	1,535	9,962	53,958	22,163	76,121
1946	9,961	64,737	182	64,919	9,345	3,113	12,458	77,377	41,919	119,296
1947	9,016	43,912	95	44,007	7,642	1,372	9,014	53,021	29,869	82,890
1948 Prel. 3/	8,944	84,275	214,620	298,895	23,725	96,335	120,060	418,955	42,853	461,808

1/ First Trade Agreement with Canada became effective January 1, 1936. (For further detail see August 23, 1948 issue of Foreign Crops and Markets.)
2/ Second Trade Agreement with Canada became effective January 1, 1939.
3/ Canadian Embargo on Feeder and Slaughter Cattle removed August 16, 1948.

Office of Foreign Agricultural Relations. Compiled from official sources.

February 16, 1949.

FRUITS, VEGETABLES AND NUTS

FLOODS DAMAGE VEGETABLES IN MEXICO

Floods during January destroyed considerable acreage of growing crops and disrupted rail transportation of vegetables in Sinaloa and Sonora, Mexico. Early reports indicate that 25,000 acres planted largely to beans in the Rio Fuerte Valley of Sinaloa were inundated. About 35,000 acres of beans, garbanzos and cotton were flooded in the Sinoloa Valley. Two heavy frosts in January also caused severe damage to tomatoes. Lesser acreages of beans, corn and cotton were flooded in other areas further south.

Lack of railway transportation between the tomato areas and the United States is causing a severe blow to the economic life of Sinaloa. Tomatoes, and to a lesser extent chilis, and peas which are the principal money crops of that area. Only a small portion of these crops which have not been destroyed by flood and frost are being moved by plane and train.

Flood conditions in the vegetable growing area of Sinaloa have suspended shipments between January 10 and February 14. The railroad bridges near San Blas, Sinaloa, Navojoa, and Sonora were washed out and repairs have been delayed. Railroad service between Navojoa, Sonora and Nogales was resumed January 26, 1949. Repairs on the Fuerte River bridge at San Blas, Sinaloa will be completed by the middle of February and railroad service between Guadalajara and Nogales will be resumed.

Because of these interruptions, vegetable growers in Sinaloa have utilized large freight planes to transport tomatoes and peppers from Culiacan Sinaloa to Guaymas, Sonora where the vegetables were then loaded into refrigerator cars and hauled to Nogales. Another airlift service was initiated by a company in San Antonio, Texas which transported vegetables from Culiacan, Sinaloa to Nogales, Arizona. Between January 21 and 31, this airway carried 139,574 pounds of tomatoes and 50,414 pounds of peppers. Upon its arrival in Arizona, the produce was unloaded into trucks and moved on to the different markets in the United States. Cost of this transportation was around $2.00 per lug of 34 pounds.

Vegetables shipped through the port of Nogales, Sonora, Mexico, January 16 - 31

	1947	1948	1949
	1,000 pounds	1,000 pounds	1,000 pounds
Tomatoes	33,203	10,883	1,081
Peppers, green	2,198	2,565	65
Peas, green	1,011	880	2
Eggplant	3	35	-
Cucumbers	9	-	-
Mixed	6	20	-
Total	36,430	14,383	1,148

Total vegetable shipments for season through the port of Nogales, Sonora, Mexico, to January 31

	1947 1,000 pounds	1948 1,000 pounds	1949 1,000 pounds
Tomatoes	83,649	33,649	19,196
Peppers, green	10,363	7,520	1,597
Peas, green	4,773	1,114	740
Mixed	254	91	34
Total	99,039	42,374	21,567

Plans have been made for a fleet of 10 freight planes to transport vine-ripened tomatoes from La Paz, Lower California to Nogales, Arizona, beginning February 1. The vine-ripened tomatoes will be packed in cartons of 20 pounds net weight, and each plane will transport 12,000 pounds per trip. Twenty flights daily will be landed when shipments reach their peak around March 15.

Tomatoes have also been shipped by boat from the Port of Altata, Sinaloa to Guaymas, Sonora where they were transferred to railroad refrigerator cars for shipment to Nogales.

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from Page 147)

ARGENTINA ANNOUNCES COARSE GRAIN PRICES

Prices to be paid Argentine producers for coarse grains during the season ending November 1949 were announced on January 31. The barley price has been set at the equivalent of $0.97 per bushel in United States currency, compared with $0.88 per bushel for the 1947-48 crop. Prices for oats and rye remain unchanged from last season's rate of $0.69 and $1.32, respectively. All prices are basis No. 2 grade, bagged grain, on track at the port of Buenos Aires.

The decree announcing the prices notes that the increase in the price to be paid for barley is intended as an incentive to growers to expand production of that grain. Barley supplies are below normal, with the current crop estimated at about 30 million bushels, compared with 40 million a year ago and 54 million bushels in 1946-47.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	2-17	99.05 lbs.	Tallari		
Ashmouni, F.G.F	"	"	"		
Karnak, Good	"	"	"		
Karnak, F.G.F	"	"	"		
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	620.00	23.86
Broach, Fine	"	"	"	650.00	25.01
Kampala, East African	"	"	"	(not available)	
Karachi		Maund			
4F Punjab, S.G., Fine	2-16	82.28 lbs.	"	88.00	32.27
289F Sind, S.G., Fine	"	"	"	94.50	34.65
289F Punjab, S.G., Fine	"	"	"	99.00	36.30
Buenos Aires		Metric ton			
Type B	2-17	2204.6 lbs.	Peso	a/ 3350.00	45.24
Lima		Sp. quintal			
Tanguis, Type 5	2-15	101.4 lbs.	Sol	(not quoted)	
Pima, Type 1	"	"	"	(not quoted)	
Recife		Arroba			
Mata, Type 4	2-17	33.07 lbs.	Cruzeiro	215.00	35.37
Sertao, Type 5	"	"	"	225.00	37.02
Sao Paulo					
Sao Paulo, Type 5	2-16	"	"	216.00	35.54
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	132.00	25.06
Houston-Galveston-New Orleans av. Mid. 15/16"	2-17	Pound	Cent	XXXXX	32.35

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.

a/ Nominal.

MILLS IN INDIA FACING COTTON SHORTAGE

A large number of cotton mills in India are facing the possibility of a shut-down unless supplies of cotton of 15/16 inch and longer staples can be obtained in February and March, according to a report from Henry W. Spielman, Agricultural Consular Attache, American Consulate General, Bombay. The shortage is attributed to delays and difficulties encountered in obtaining cotton from Pakistan, the chief source for this type of cotton. Mills in India normally use 665,000 to 835,000 bales (of 500 pounds gross) of Pakistan cotton each year. The Government of Pakistan has allocated 542,000 bales (650,000 Pakistan bales) for export to India during the year ending August 31, 1949. At least 271,000 bales were expected to arrive in Bombay by the end of January but only 42,000 were received.

The delay in movement of cotton is attributed largely to the fact that more than half of the export quota was allocated to merchants not previously engaged in cotton export trade. Prior to December 18, 1948, established shippers in Karachi had negotiated sales of nearly 175,000 bales (over 200,000 Pakistan bales) to firms in India and had arranged for Indian import licenses. The export allocations announced by the Pakistan Government on December 19 were issued to 131 firms, more than 100 of which had never traded in cotton before. Allocations ranged from 2,000 to 5,000 bales to each firm (average 3,000) regardless of previous status. Many of the license holders do not possess cotton to offer for sale.

Large quantities of cotton are stored in open spaces in the Port Trust area, or in sheds without walls, awaiting outcome of the confused situation. At least 12 fires have been reported in this area since the heavy accumulation of cotton began, with destruction estimated at more than 30,000 bales. Insurance companies and financial institutions refuse to renew or issue new insurance policies or grant loans on cotton stored in this manner. Established shippers do not expect a re-allocation of export quotas until after the end of February.

In the meantime cotton merchants and mill owners in India have requested the Government to authorize the importation of about 165,000 bales (200,000 Indian bales) of 15/16 to 1-1/16-inch cotton from Brazil or the United States for delivery in February and March. Private sources report that negotiations are already underway for 145,000 to 165,000 bales of American cotton. An Indian mission recently purchased about 165,000 bales in East Africa under the terms of a joint Indian-British-East African agreement. Negotiations for 83,000 bales from the Sudan are reported to be in progress and the usual importation of approximately 250,000 bales of long-staple cotton from Egypt is expected this season.

The 1948-49 cotton crop in India is now estimated at about 1,880,000 bales, instead of 2,050,000 as reported recently, and a previous estimate of 2,500,000. Early drought in some areas and excessive rains and storms more recently in Central India are the principal causes for lower estimates. About 250,000 bales are usually of very short staple unsuited for consumption by mills in India. Mill consumption in 1948-49 is expected to reach nearly 3,700,000 bales or about 300,000 bales above the total for 1947-48. An additional 200,000 to 225,000 bales are usually consumed each year in hand spinning and other industries.

COTTON CONSUMPTION IN NETHERLANDS INCREASING

Cotton consumption in The Netherlands showed a substantial increase in the first 4 months of the 1948-49 season. From October 11 to December 4 weekly cotton consumption established a new postwar record, averaging 4,600 bales per week, or an annual rate of about 240,000 bales per year. For the first 4 months of 1948-49 season cotton consumption was running about 15 percent above the corresponding period for the previous season and is now slightly above the prewar rate (1934-38 average).

However, supplies of raw cotton in The Netherlands have been declining and the mills reported a tight supply situation in November. On December 1, 1948, mill stocks were reported at 40,000 bales or about 2 months' supply. Over the past 2 seasons mills have maintained stocks around 3 to 3-1/2 months' supply. Port stocks have been maintained at 40,000 to 45,000 bales. However, probably 50 percent of these stocks are made up of intransit cotton for other countries. Therefore, total stocks in The Netherlands for domestic consumption did not exceed 3 months' supply on December 1, 1948. Recent reports indicate the supply situation deteriorated even further during December and January.

The Economic Cooperation Administration has authorized the shipment of 80,000 bales of cotton to The Netherlands, none of which had been shipped by December 1, 1948. This cotton should be of considerable help. However, with a tight supply situation in Brazil, Peru, and India, which have been a major source of cotton imports, The Netherlands must rely more heavily on cotton from the United States.

If sufficient supplies of raw materials can be obtained and sufficient skilled labor trained, The Netherlands plans to increase cotton textile production in 1948-49 about 20 percent over the 1947-48 season. Cotton spindles now in use are reported at 1,165,000 as compared with a prewar total of 1,260,000 spindles. If sufficient raw materials and labor were available to operate 2 full shifts, production could be increased considerably above prewar with present capacity.

The Netherlands imported in prewar years, about 20 percent of its yarn requirements. They have had postwar difficulty securing sufficient yarn to keep the weaving mills fully occupied. Under present plans this yarn, formerly imported, is to be supplied by increased domestic yarn production.

Revised supply and distribution of raw cotton in The Netherlands, submitted by H. G. Bolster, Agricultural Attache, American Embassy, The Hague, is shown below.

Netherlands: Supply and distribution of raw cotton, 1945-48

Item	1945-46	1946-47	1947-48
Stocks, August 1	23,000	48,900	83,400
Imports	138,900	216,400	206,800
Supply	161,900	265,300	290,200
Consumption	113,000	181,900	220,900
Stocks, July 31			
Mill	43,900	69,400	63,400
Port	5,000	14,000	5,900
Total	48,900	83,400	69,300
Distribution	161,900	265,300	290,200